

Gift of Stock Transmittal Form

Date of Transfer/Record

Received by Gift Processing: _____
Entered in Advance System: _____

_____ Date _____ Initial _____

Name of Donor

Entity #

Source of Information

Date

Address

Joint Gift: Yes
No

Spouse Name

City, State, Zip Code

Name of Stock

Number of Shares

Per Share \$ Value

High

Low

Pledge #

Stock Broker or Certificate #

Amount

Allocation Number

Amount

Allocation Number

Total Amount

Acct Name: _____ Acct Name: _____

Comments: _____

Gift Receipt #

Date Gift Receipt Mailed

Entered on Advance System: _____
Packet Reviewed for Filing: _____

_____ Date _____ Initial _____

Date of Sale

Sale Price

Commission/Fees

Net Proceeds

Development Deposit Date

JV to Record Gift & Sale

JV to Move Gift from Holding Account
(If Necessary)

CDO / Date Notified

Account Manager / Date Notified

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